#### Approval Groups

- You can define an Approval Group made up of 3 parts:
  - the approval rules
  - the individuals whose orders are subject to these rules
  - the individuals responsible for approving or rejecting the orders that exceed these rules
- Use the Order Approvals feature in eway to create your own Approval chain.

#### Access the Order Approvals Feature

• From the Account menu, hover the My Account tab and select option Account Management Centre.

		Message	Eive chat	O Change	postal code
🚫 Ink & Toner		Account	⊕ Quick Add	Q Help	Eart 3
Hello Cinthia! 020 (178410)		Close			
Shopping	Edit My Profile	Acco	unt Mana	agemen	t Centre
Orders	Change My Password		7	(8)	۱.
My Account	Account Management Centre				

• From the Account Management Centre page, click on the link Manage Order Approvals in the Order Approvals tile.

2.	•	=
User Management	Order Approvals	Custo
Jser Set-up & Maintenance	Order Approval Set-Up & Maintenance	Custom
Search & view users, add users, edit users, copy users, delete	Create approval rules, modify approval rules, control approver	Create
users, reset passwords, activate/deactivate users, assign administrators and more.	delegation for users or cost centres, and more.	Manage
Manage Users		
Reports	Manage Order Approvals	
Online Access to Extract Reports		
Easily extract various reports, including usage reports, and		
Easily extract various reports, including usage reports, and more.		
Manage Reports		



# Approval Groups Home Page

The Home page displays all existing approval groups.

- You can use the breadcrumbs at the top of the page to navigate between the pages you have visited.
- The number of existing approval groups in the list is displayed in parentheses to the right of the page title.
  - This number varies when a search or filter is applied.
- Use the column headers to sort list contents in ascending or descending order.

Depending on your administrator level, either advanced or intermediate, the list could display all the approval groups in your organization or only the approval groups that you administer.

Account Management Centre > Order Approvals					
Order Approvals (214)					
Search Approval Groups Q				Create New Group	Filters
Group Name 🌲	Administered By	Approvers 🖨	Members 🜲	Approval Rules 🌲	
100		1	1	1	:
123		1	1	1	:
123123	Karl Finer	1	0	0	:
123123123	Karl Finer	1	0	0	:

# Search for an Existing Approval Group

- To edit, view or delete an existing approval group, you must first use the search options to find the group.
- Enter the text you are looking for.
  - Intuitive search displays results as you enter text.

Order App	provals (2)		
Doc	Q		
Group Name	\$	Administered By 🌲	Approve
Doc			3
DocTest2		Jasmine Miller	0



# Filter the Approval Groups Listing



- Use the filter to narrow your search.
  - All Approval Groups
  - Groups with an assigned admin
  - Groups without an assigned admin
  - Groups with a specific admin
    - Specify the admin in question.
- Click on Done.

The filter option is grayed out for intermediate users. This type of administrator can only see the groups they administer, so the filter has no impact on the list of approval groups.

#### Manage Approval Groups

- After finding the approval group you are looking for.
  - Click on the blue name of the group to view it.
  - Click the ellipsis menu.
    - You can **Edit** approval group.
    - You can **Delete** the approval group.

Order Appro	vals (2)					
Doc	Q		ſ	:	Create New Group	Filters
Group Name 🌲		Administered By 🌲	Approv	Edit Group 🗘	Approval Rules	;
Doc			3	Delete Group		Edit Group
DocTest2		Jasmine Miller	0	1	1	Delete Group



#### Creation Step 1 - General Information

• To create a new approval group, click on the **Create New Group** button.

Search Approval Groups Q		reate New Group		Create New Group	<b>⊽</b> Filte
Group Name 🌲	Administered By 🌲	Approvers 🖨	Members \$	Approval Rules 🌲	
		1	1	1	

- Name your group.
- Click on Next.

General Information	2 Approvers	3 Members	4 Approval Rules	
General Information				
Group Name		<u> </u>		" indicates requir
Staples Level 1		- Cana	uni Information	
		L Gene	eral information	
Created By				
Cinthia Savard				
Creation Date				
04/19/2023 01:27 PM				
Last Modified By				
Cinthia Savard				
Last Modification Date				
04/19/2023 01:27 PM				
Administered By	User Search			
Cinthia Savard	~			
Cle	ear "Administered By"	Novta		

## Creation Step 2 - Approvers

- Name the individuals who will be responsible for approving or rejecting the orders.
  - Click on the Add button to open the Search for an Approver window.

Create New Grou	ıpq						
1 General Information	2 Approvers	3 Members	<b>4</b> Approva	al Rules			
Approvers							
Sort by Last Name	~	2 /	Approvers	)			<ul> <li>Indicates required field</li> </ul>
User ID	First Name	Last Name	Send Order S Notification	Show on Site	Can Modify Order	Default Approver	
				Ad	ld	]	Add Remove Selected

- Use the Search for an Approver function to find the individuals to be named as Approvers.
- Select the field that will be used to perform the search.
- Enter the text you are looking for.

You may use the asterisk [\*] as a wildcard character to complete a partial entry. If you enter only an asterisk as the text to search for, you will get the complete list of users.

• Use the filter to narrow your search.

The Filter button doesn't display for Intermediate users. These users can only view groups they administer.

• Click on Search.



# 🔜 ORDER APPROVALS (PDF)

#### Creation Step 2 - Approvers

Search for an Approver	Approver Listing No Approv	vers Found	oct Lise
Search Field		Ci	ancel
Search Text 😵			
* Filter By Status			
Both Active & Inactive Users			
Search >			
	4	Þ	
	To choose Approver(s), highlight one or more Users in t above and click Select User.	ne list	

- Select one or more individuals. Use the *Ctrl* key for multiple selections.
- Click on Select User to confirm the selection.

Approver Li	isting	2 A	Approvers found	
Cinthia	Savard	CinthiaSavard	Active	Select Llear
Carole	Savard	nouveau	Active	Cancel

#### Creation Step 2 - Approvers

• For each approver, these options can be enabled or disabled.

Create New Gro	up							
1 General Information	2 Approvers	3 Mem	bers 🖌	Appro	oval Rules			
Approvers								
Sort by Last Name User ID	First Name	<ul> <li>Last Name</li> </ul>	Ser	nd Order	Show on Site	Can Modify Order	Default	* indicates required field
evqbmosavardcin2	Fiona	Miller		2	2	2	<b>Z</b>	Add
caeuser	Shawn	Miller		~	2			Remove Selected
				_/	/			
	Send Order Notification	Show on Site	Can Moo Order	lify	Defau Approv	lt /er		
	<b>Z</b>	<b>Z</b>			<b>V</b>			
		<b>v</b>	<b>V</b>		✓			

- Check **Send Order Notification** so that this approver receives a notification email when an order is waiting for approval for his group.
- Check **Show on site** to have the name and email address of this approver appear in the Review and Confirm screen of the Check-out process.
- Check **Can modify order** to allow this approver to make changes to the order before it is approved.
- Check **Default approver** to have this approver automatically selected to receive the notification email in the Review and Confirm page.
- This last option is used along with the **Selection** feature shown at the bottom of this screen.



- Yes, allows users to select the approvers who will receive the email notification for their order during their check-out process.
- No, means that all approvers with the Send Order Notification flag enabled will receive the approval notification.
- To delete an Approver's name from the group, select the line and click on Remove Selected.
- Click on Next.



#### Creation Step 3 - Members

Create New Group	
1 General Information 2 Approvers 3 Members 4 Approval Rules	
Members	
	* indicates required field
Would you like to add users or ship-to accounts to your approval group? * 🕑	
® Add users	
O Add ship-to accounts 3 Members	
Sort by	
Last Name 👻	
1 user(s) currently belong to this Approval Group	
Benoit Larin evgbmolarinb	Add
	Remove Selected
4	»
< Previous Next > Cancel	

Sort by Last Name	~	
3 user(s) currently belong to thi	s Approval Group	
Stephen Miller	stephen.miller@staples.com	Add
Jasmine Miller	evqbmosavardcin3	Remove Selected

- Name the Buyers who will be subject to the approval rules applied to this group.
  - You can apply the approval rules either to users or ship-to accounts.
    - If you select **ship-to accounts**, the approval rules will apply to all Buyers but only when they order for one of the chosen accounts.
    - If you select **users**, the approval rules will apply to those Buyers regardless of the ship-to account they select.

The selection process is the same for users or ship-to accounts.

- Click on Add.
- Use the **Search** to find individuals or ship-to accounts to select as group members.
- To delete a member from the group, select the line and click on **Remove Selected**.
- Click on Next.



## Creation Step 4 - Approval Rules

1	Create New Group	)			
	General Information	2 Approvers 3 Members	4 Approval Rules		
	Approval Rules				
					* indicates required field
	Sort By Dollar Limit	4	Approval Rules		
	1 Approval Rule(s) currently belo	ing to this Approval Group			
	Rule Type	Resulting Action of the Rule	Operator Type	Dollar Limit	
	Line Total	To be Approved	Greater or Equal	200 🔺	Add
					Edit
					Remove Selected
				*	
	<				
	< Previous Save & Close	Cancel			

Create Approval Rule
Select approval criteria below
Rule type 🕜
Select *
Resulting action of the Rule 💡
Select *
Operator Type 💡
Select *
Dollar Limit 🕜
0 *
Save Cancel

Rule Type	Resulting Action of the Rule	Operator Type	Dollar Limit	
Line Total	To be Approved	Greater or Equal	200	
Order Total	To be Approved	Greater or Equal	500	
Order Total	Cannot Order	Greater or Equal	501	

- Click on Add to start a new rule.
- There are 2 types of rules based on the dollar amount ordered:
  - Amount on an order line
  - Amount of the order total
- There are 3 possible consequences if a rule is broken:
  - **Carbon copy** sends a copy of the order to the approvers, for their information. The order is not stopped for approval.
  - To be approved puts the order on hold so that an approver can look at it and then approve, reject or modify it.
  - Cannot order prevents the buyer from submitting the order.
- The Operator Type determines how the rule is applied.
  - When the dollar limit is exceeded (to set a maximum)
  - When the dollar limit has not been reached (to set a minimum)
- Enter the limit amount in dollars.
- Click on **Save** to confirm this rule.
- You can have more than one rule in your group. For example:
  - Have a copy of each order sent to the approvers;
  - Have orders over \$250 approved;
  - And block any order over \$1000.
- To **Edit** or **Delete** an approval rule, select the line and click on the appropriate button.
- Click on Save and Close to end the creation of your approval group.
  - The new approval rules take effect immediately.

